

## Maintain Federal Withholding Tax Exemption (W4)

**Purpose** Use this procedure to update the Federal Withholding Tax Exemption status for an employee.

**Trigger** Perform this procedure when an update to the Federal Withholding tax exemption status of an employee is necessary.

**Prerequisites** Employee hire action completed for employee.

**End User Roles** In order to perform this transaction you must be assigned the following role:  
Payroll Processor

Change History	
Date	Change Description
12/16/04	Procedure Created
12/19/14	Procedure updated to match current system. Updated screen shots.










**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Maintain

**Helpful Hints** The Payroll Processor will use this procedure to maintain an employee's tax exemption information.

**Transaction Code** PA30

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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:


Message Type	Description
<b>Error</b> 	<b>Example:</b>  Make an entry in all required fields. <b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.
<b>Warning</b> 	<b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.

## Procedure

1. Start the transaction using the above menu path or transaction code **PA30**.

2. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. <b>Example:</b> 78000559

3. Click  (Enter) to validate the information.
4. Click the **Payroll** tab.
5. Select *Withholding Info W4/W5 US* to select.

## Title: Maintain Federal Withholding Tax Exemption (W4)

HR master data Edit Goto Extras Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. 78000559

Name WILSON ROBERTA

PersArea 3030 Department of Health EEGroup 0 Permanent

PSubarea 00GL Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal ...

Infotype text S..

Unemployment State ✓

Withholding Info W4/W5 US ✓

Add. Withh. Info. US ✓

Other Taxes US

IRS Limits USA

Garnishment Document ✓

Garnishment Order ✓

Garnish. Adjustment

Bond Purchases

Period

Period

From 01/01/1800 To 12/31/9999

Today Curr.week

All Current month

From curr.date Last week


To Current Date Last month

Current Period

Choose

Direct selection

Infotype Withholding Info W4/W5 US SIy

6.  (Copy) to copy and continue.
7. Select the appropriate Tax Type:

Subtypes for infotype "Withholding Info W4/W5 US" (1) 997 Entries...

Restrictions

Auth	Description	Tax Level
AL	Alabama	B
AL01	Attalla	D
AL02	Bessemer	D
AL03	Brilliant	D
AL04	Gadsen	D
AL05	Goodwater	D
AL06	Glencoe	D
AL07	Guin	D
AL08	Hamilton	D
AL09	Mountain Brook	D
AL0A	Opelika	D
AL0B	Rainbow	D
AL0C	Southside	D
AL0D	Tuskegee	D
AL0E	Red Bay	D
AL0F	Auburn	D
AL0G	Birmingham	D
AL0H	Jefferson	C
AL0I	Haleville	D

997 Entries found

### Example: FED

Infotype Edit Goto Extras System Help

Copy Withholding Info W4/W5 US (0210)

Personnel No. 78000559 Name WILSON ROBERTA

PersArea 3030 Department of Health EGroup 0 Permanent

PSubarea 00GL Agencywide ESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 09/16/2012 to 12/31/9999

Status

Tax authority FED Federal Tax level A Federal

Filing Status 01 Single

Exemptions

Allowances ☐

Tax Exempt Ind. Not exempt ☐ IRS mandates

☐ Foreign Earned Income

Withholding adjustments

Add.withholding 50.00 USD ☐ Non-resident tax calculation

Default formula 01 PCT MTHD-RES. U Alternative formula ☐


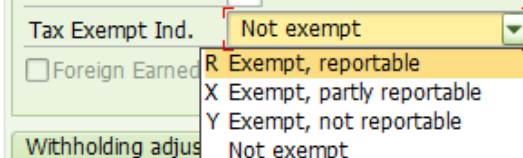
Additional Information

☐ Check here if the last name differs from that shown on the Social Security card

Overrides (from Infotype 0234)

From date	End Date	Supplemental method	Tax override	Empl. Override Group
09/16/2012	12/31/9999		0.00	0450

8. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	<p>This is the date on which the record begins</p> <p> 1<sup>ST</sup> Day <b>after</b> the check date of the previous pay period.</p> <p><b>Example:</b> 12/11/2014</p>
Tax Exempt Indicator	R	<p>This allows the user to identify a tax type from which the employee is exempt from paying.</p> <p>Click on the dropdown to select the appropriate type</p>  <p><b>Example:</b> Exempt, reportable</p>

**Copy Withholding Info W4/W5 US (0210)**

Personnel No. 78000559 Name WILSON ROBERTA  
 PersArea 3030 Department of Health EEGroup 0 Permanent  
 PSubarea 00GL Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 12/11/2014 to 12/31/9999

**Status**  
 Tax authority FED Federal Tax level A Federal  
 Filing Status 01 Single

**Exemptions**  
 Allowances 0  
 Tax Exempt Ind. R Exempt, reportable ☐ IRS mandates  
☐ Foreign Earned Income


**Withholding adjustments**  
 Add.withholding 0.00 USD ☐ Non-resident tax calculation  
 Default formula 01 PCT MTHD-RES. U Alternative formula ☐

**Additional Information**  
☐ Check here if the last name differs from that shown on the Social Security card




**Overrides (from Infotype 0234)**







From date	End Date	Supplemental method	Tax override	Empl. Override Group
09/16/2012	12/31/9999		0.00	0450

9. Click  (Enter) to validate the

 You may receive warning messages

**Display logs**

Ty...	Message Text	LTxt
	Exemption checkbox selected; end date should be changed to 20050215.	
	Tax exemption claimed; file W-4 to agency	

  Correct errors    

10. Click  (Continue) to continue.

11. Click  (Save) to save.

Results
You have updated the employees Federal Withholding Exemption status.
Comments
None.